



# STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

**Working Title**

Citizen Services Bureau Office Specialist

**Job Code Title**

Administrative Specialist

**Pay Band**

05

**Job Code Number**

131915

**Citizen Services and Resource Management Division**

Citizen Services Bureau

**Fair Labor Standards Act: Non-Exempt**

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Citizen Services and Resource Management Division administers the accounting, purchasing, safety, security, statewide facility functions, call center, forms design, one-stop business licensing coordination, and receipt and distribution of unclaimed property. The division includes the Financial and Asset Management Bureau and the Citizen Services Bureau (CSB). The Citizen Services Bureau operates the Call Center whereby citizens can call with questions, inquire about their tax accounts, and get the information needed to conduct business with the department; administers the One-Stop Licensing Program which is a one-stop shopping for businesses to register and renew their business licenses from numerous agencies participating in the program; advertises unclaimed property that has been turned over to the state in an effort to locate the rightful owners and processes claims for the return of the property; and coordinates the annual design of forms, tax returns, and instructions for administering taxes and licenses.

**Job Responsibilities**

The Office Specialist works with the Citizens Services Bureau Chief to provide administrative, clerical, technical support, and assistance in managing program functions. Work includes office management and coordinating the various programs in the bureau including back up for the call center, unclaimed property, one-stop licensing, and administrative support for the forms design team. The position reports directly to the bureau chief and provides lead worker oversight to the customer service representatives.

**• Office Manager 45%**

1. Conducts research and prepares written reports for the bureau chief regarding call center, unclaimed property, forms design, and one-stop licensing. Compiles statistical and narrative status reports that include spreadsheets, graphs, and charts.
2. Composes correspondence, reports, and responses for the bureau chief's signature by reviewing and summarizing studies, statutes, policies, and other important documents.
3. Maintains office equipment and supplies. Monitors and calls appropriate repair and backup staff depending on the equipment and service contract.
4. Provides human resource assistance by reviewing job profiles, tracking call center employee training needs, ensuring new hires have needed instruction, and serving on hiring panels.

5. Provides lead work oversight to customer service representatives to ensure good customer service. Reviews the performance of call center employees to ensure correct information and timely responses to callers. Monitors calls and tracks areas of deficiency. Identifies training information needs from the nature and type of issues or trends. Provides potential solutions and develops desktop instructions to ensure work unit procedures are followed by all staff.
6. Coordinates personnel management services including workforce tracking, vacancy announcements, orientation, documentation, and referral as appropriate. Provides new employees with training and instruction on department policies. Monitors progress of on-the job training for new employees. Coordinates with the Office of Human Resources to implement and maintain department-wide policies, procedures, and initiatives.
7. Provides guidance, technical assistance, and training to customer service representatives, one stop licensing specialists, and unclaimed property specialists. Responds to complex or contentious issues referred by other staff. Coordinates with Liquor Control Division staff to promote consistency in office operations by identifying resource-sharing opportunities, resolving common problems, and promoting interoffice coordination and support throughout the department.
8. Handles unresolved customer problems to ensure they are dealt with at the lowest possible level. Provides guidance in handling difficult or complex problems, resolving escalated complaints or disputes, speaking to taxpayers, and referring complaints to designated divisions or agencies for further investigation. Works with taxpayers who request to speak with a supervisor when the bureau chief is not available or to gather information and prioritize complaints.
9. Coordinates staff from all bureau programs to ensure timely customer service by identifying and resolving problems or seeking management input as appropriate. Provides back up, answers questions, and recommends improvements to bureau processes.
10. Works with the Liquor Control Division Management Officer to maintain the facility. Contacts the Department of Administration, General Services Division or appropriate contractor for repairs and maintenance.
11. Approves payment of bills. Verifies the bill matches the packing slip; ensures the bill does not include something that was not received; and splits the bills for supplies between CSB and Liquor Licensing. Bills for the entire building (such as water bills) are split according to a pro rata split and the CSB portion is approved by this position.
12. Maintains a bureau policy manual by consolidating and drafting summaries of department and state policies and updating outdated policies.
13. Distributes directives and requests for information from the bureau chief to the staff and monitors implementation.
14. Monitors personnel issues including handling day-to-day issues and approving leave requests and time cards when the bureau chief is not available. May review and recommend action on leave requests.
15. As the first line of response to questions from the public, probes the situation and either makes sure it goes to the right person or resolves the issue. Monitors problems and questions coming through the bureau chief's office to ensure timely response to issues. Makes sure the information gets to the appropriate person.
16. Monitors timelines for the forms design team to ensure deadlines are met. This includes notifying others when there is risk of delay; fielding questions and resolving interruptions that could delay the project; maintaining contacts between work units, external printing vendors and software vendors; and tracking the approval process. Distributes draft booklets and forms to other work units for review and input ensuring review deadlines are met.

- **Back Up for Bureau Functions 50%**

1. Assists call center by taking calls as scheduled and by monitoring the call center queue to take calls during particularly busy times. Answers inquiries from internal and external customers to identify and resolve problems regarding department tax and licensing processes.

2. Interviews callers to resolve customer problems with registration, licensing, or audit discrepancies. Gathers the facts regarding tax filing, registration, licensing, or other areas based on the caller's needs.
3. Researches facts and responds to questions based on legal constraints and goals and objectives. Considers laws, policies, and precedents when answering taxpayer inquiries and resolving problems. Updates tax files based on the additional information gathered. Researches information to answer questions regarding policies, procedures, rules, and statutes.
4. If a taxpayer needs to be registered, sends work item and all pertinent information to the Processing Bureau for registration and to get a coupon created. Upon registration, notifies the customer if a delinquency exists and requests payment.
5. Assists customers in filing returns for all tax types and explains filing deadlines, deficiencies, and all tax responsibilities. Assists internal and external customers with licensing requirements.
6. Advises taxpayers and tax preparers on the proper methods and procedures for preparing returns based on federal and Montana laws, rules, and regulations. Provides general information for individual income tax, withholding, corporate license tax, and collections documents.
7. Processes unclaimed property claims for owners of unclaimed property. Gathers information needed to distribute property to its rightful owners. Sets up and approves claim forms. Locates holders to obtain more information and answering inquiries. Responds to inquiries about potential unclaimed property. In cases where there none exists, sends correspondence to let them know there is no property. Answers questions received via phone calls, mail, and email.
8. Provides assistance to other department work units to ensure the accuracy of unclaimed property holder reports. This assistance may include answering questions about reports as filed, contacting the holders of unclaimed property to gather more information, clarify the proper method of completing reports, and monitoring the unclaimed property email box to ensure that all emails received are answered timely.
9. Researches converted information on the current system and also the previous unclaimed property system for holder reports that may not have been converted to new system. Works with other units to move the money and report to the current system as needed. This is usually a time sensitive matter because owners are waiting to have property returned to them.
10. Inventories the documents or other contents of safe deposit boxes. Researches and makes decisions regarding the value of papers included in the safe deposit box inventory in order to determine if the papers must be retained or if they can be destroyed.
11. Processes master applications that include registering customers in the one-stop web-based system and distribution of payments. The one-stop licensing program is coordinated by the department on behalf of five agencies and includes seven licenses through a single contact with the department.
12. Issues and processes renewals for existing customers in the one-stop system. This includes updating registration information when necessary, distribution of payments, and deciding whether or not to issue a one stop license based on information provided.
13. Issues bills on behalf of all agencies for delinquent renewals or additional licenses identified by an agency.
14. Identifies and refers precedent setting or extraordinarily technical questions that arise in the operation of bureau programs to appropriate sources and tracks the information request to insure a timely response.
15. Assists with system testing of new electronic filing programs or system changes from the customer's point of view, such as testing the "Where's My Refund?" phone system and online program. This also includes testing system changes that affect other bureaus or divisions.

- **Other Duties as Assigned 5%**

1. Performs other duties assigned by the supervisor.
2. Participates on various teams as needed which could include the safety and security team, the Green Team, and management officer team.

## **Job Requirements**

To perform successfully as an administrative support specialist, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. It is essential that the incumbent has the ability to concentrate in the face of multiple distractions. Skills in multi-tasking; paying attention to details and accuracy; managing multiple priorities under tight deadlines; mathematics; providing timely and effective written, verbal and interpersonal communication; interpreting and responding to specialized information requests; dealing with a wide range of personalities using discretion; active listening; critical thinking; conflict resolution; compiling, analyzing, and reporting data from multiple sources; following written and oral directions and instructions; researching data to identify and resolve a wide variety of problems and issues; and word processing, spreadsheet, and database applications are required. This position works with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job.

This position requires knowledge of accounting; office auditing techniques; automated call distribution (ACD) phone software; department business processes including the department's integrated tax system (GenTax); structure and function of each work unit in the bureau; licensing and registration requirements; individual tax types; available electronic resources to provide overall tax service to taxpayers; applicable federal and state laws, administrative rules, and policies; and office management procedures.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is one year of job-related post-secondary training in business administration, office management, or related field and four years of directly related work experience including administrative, technical, or clerical experience using advanced computer skills.
  - Other combinations of education and experience will be evaluated on an individual basis.

## **Department Core Values**

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

## **Working Conditions**

Must work under time constraints, be able to maintain numerous projects at one time, and determine priorities on a daily basis. There are cyclical periods of high stress working under pressure of critical projects with hard deadlines. At times, the incumbent will deal with angry, hostile, and difficult individuals to resolve concerns. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. This position requires considerable computer and

keyboard use. Work hours may exceed 40 hours per week from time to time, especially during peak tax seasons. The incumbent may spend considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

**Special requirements**

- Background Examination: Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- Compliance with All Appropriate Montana Tax Laws: An employee's tax status must be current.

**This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.**

**Division Administrator Review:** The statements in this job profile are accurate and complete.

Signature: Steve Austin, Division Administrator Date: August 2010

**Human Resource Director Review:** The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: August 2010

**Employee:** My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name (print): \_\_\_\_\_